Release Notes for IVEE 2.2

Note: The list of changes below describes all of the changes and enhancements made to IVEE for the new version (2.2).

Accounts Receivable

Menu Item/Function	Description	SAR
Accounts Receivable Default Settings	**Enhancement**: Added an option to enable you to suppress the district name and address on invoices.	59833

Fixed Assets

Menu Item/Function	Description	SAR
Asset Maintenance	**Enhancement**: Added a new option to enable you to archive disposed assets.	63532
Asset Reports	**Enhancement**: Added a new option to print a listing of fixed and non-assets combined.	52378
Depreciation Reports	Changed the Exception report to sort by Tag Number, then Description, then by Depreciation Account .	70037
Reassign Asset Detail	**Enhancement**: Added PO Number to the grid.	63411
Report Writer	**Enhancement**: Added Archived to the selections in the Status field.	63532

General Ledger

Menu Item/Function	Description	SAR
Account Code Input	If there is a valid prior year database connection, the system will now check to see if the rollover step has been done for payroll (step 6). If not, the system won't allow you to delete accounts.	56556
Account Offsets	**Enhancement**: Added the ability to identify multiple matches in your filtering offsets.	71578
Bank Accounts	**Enhancement**: Added a utility to enable you to specify different check number ranges for payroll checks and all other checks.	70161
	Enhancement: Added a positive pay file format for Los Alamos National Bank (ARP3).	68146
Bank Statements	**Enhancement**: Only posted deposits will now display for clearing.	43680
Budget Control Group Reporting	**Enhancement**: Added the ability to show transaction detail.	67428
Budget Input Using Definition	Corrected an error that occurred when Col. 1 was of the YTD Encumbrance or YTD Expenditure and Encumbrance type.	71372
Deposit Manager	Corrected a problem with Deposit Manager creating entries to interfund due to/due from even when everything was in the same fund.	15501
	Enhancement: Changed the deposit process to require that only authorized users can post a deposit. Only posted deposits will now display in deposit listings and reports.	43680
Financial Statements	Made the first column in the report a little larger to accommodate longer account numbers.	71856
Fund Balances	**Enhancement**: Added an optional Fund Type selector to the GL Fund Balance Report	27180
Grants Management Report	**Enhancement**: Added an option to enable the report to add the budget amounts across fiscal years .	70648

Menu Item/Function	Description	SAR
Journal Detail	**Enhancement**: Added the ability to display prior years data on the Transactions tab.	44470
	Enhancement: Added deposit receipt number to the transaction display for views Full, Account and Entry, and Entry.	72552
Position Budgeting	Masked the employee SSN on the detail screen.	69859
Process Fiscal Year Rollover	**Enhancement**: Added a new step to enable you to roll over your Benefits Enrollment information to the new fiscal year.	72225
	Added the option to cancel the Export Open Purchase Orders action if you receive the message that some funds were not cross-walked.	70818
Report Writer	Corrected a problem withthe invoice number dropping any leading zeros when running the report with maximum detail.	71868
	Corrected a problem that occurred when running multiples of the trial balance, budget adjustments, budget report, and budget report using definitions.	71989
	Corrected a problem with a time out error that sometimes occurred when running a report with a lot of JE Detail, but not a lot of journal entries.	72980

Human Resources

Menu Item/Function	Description	SAR
Certificate Report	**Enhancement**: Added a new field to include or exclude archived certificates.	48588
Compensation Statement Category	**Enhancement**: Added a new menu item to enable you to define compensation statement categories and subcategories. This new menu item is part of setting up Total Compensation Statements.	70407

Menu Item/Function	Description	SAR
Compensation Statements	**Enhancement**: Added new menu items to enable you to set up, generate, review summary information for, and print employee compensation statements.	63851 71849 72815
Contract Maintenance	**Enhancement**: Added an option to the Print Options tab to include/exclude inactive account codes.	54358
Contracts Report	**Enhancement**: Added an option to include or exclude full Social Security Numbers in the printed contract.	58585
	Added dollar signs ($) in front of dollar amounts in the printed contract.	61116
	Corrected a problem with the last line of the text that is in the Print Before Detail area cutting off the bottom of the last line printed.	72686
Daily Absence Report	**Enhancement**: The report will now include weekend days.	70743
Deductions and Benefits	**Enhancement**: Added a new field to enable you to map a Compensation Statement category/sub-category to deductions.	70407
Education Credit Types	Moved the menu item to the Education/Credentials Human Resources | Configuration | Education/Credentials.	42373
Education Report	**Enhancement**: Added an option to enable you to choose whether you want to include salary schedule placement information in the report.	60324
Employee Certificates	**Enhancement**: Added the ability to archive old certificates.	48588
Employee Contracts	**Enhancement**: Added employee DAC to the exported Mail Merge file.	47536
	Corrected a problem with not being able to add more than one addendum.	55980
Employee Evaluations	**Enhancement**: Changed the list of names displayed in the Evaluator drop-down list to include just employees identified as supervisors.	63948

Menu Item/Function	Description	SAR
Employee Insurance Assignments	**Enhancement**: Flex and Voluntary Life elections that have $0 employee premium will post through to insurance assignments as inactive.	62591
	Enhancement: Added a shortcut to the Employee Deductions and Benefits screen.	63971
	Enhancement: Unmasked the Social Security Number for authorized users.	70045 70390
	Enhancement: Added a renewal date field.	72761
Employee History Connection Groups	Moved the menu item to Security | Workflow Configuration | History Connection Groups so that it could be used in other modules in addition to HR/PR.	44470
Employee Leave Plans	Plans added by an employee template will default to active.	68484
	Enhancement: Added a new field to enable you to specify the value of beginning balances. This is part of the new Total Compensation Statement utility.	70407
Employee Maintenance	**Enhancement**: The Get Web Applicant option has been enhanced to support EdZapp.	67847
	Enhancement: The Employee Documents Actions menu option has been enhanced to view and import EdZapp documents for employees.	67847
Employee Positions and Pay	New menu item. See the entry under Payroll for information.	62627
Employee Profile Changes (Portal)	**Enhancement**: Added Social Security Number to the grid. If the user is authorized to see Social Security Numbers, the numbers will not be masked. If the user is not authorized, the number will be masked.	60401
	Enhancement: Added the ability to edit the records before posting. Also added Changed By and Changed Date columns to the grid.	54427
Enrollment Report	Corrected an intermittent error that occurred when running the report.	71134

Menu Item/Function	Description	SAR
Hire Date Report	Corrected a problem with the report duplicating employees if employee has multiple positions within same DAC.	71882
Human Resources Default Settings	**Enhancement**: Added new fields to enable you to enter customized instructions on the Beneficiaries screens in iVisions.	66667
Insurance Classifications	New Plan Year Type field added to the screen. This field is for an enhancement that will be available shortly.	72760
Insurance Coverage Maintenance	**Enhancement**: Added an option to make the Primary Care Physician field required in iVisions benefits enrollment.	65868
	Enhancement: Changed the system to lock Primary Care and Other Insurance check boxes if user selects HSA plan.	72049
Insurance Coverage Level Maintenance	**Enhancement**: Added fields to enable you to select rounding amount and approach.	70441
	Enhancement: Added fields for Minimum Coverage and Maximum Coverage.	70440
	Enhancement: The system can now calculate the employee portion of a life insurance premium that is based on a multiple of salary. Previously, this only worked on the employer portion of premium.	68238
	Enhancement: Logic has been added to look for Salary/Work Agreement positions that are on a normal salary schedule. For those positions, the salary schedule amount * FTE will be used for the annual salary amount for benefits.	71488
Insurance Tracking	Changed the sequence of menu items to put Employee Benefits Enrollment (Portal) before Employee Insurance Assignments.	62668
	Enhancement: Added a new menu item to enable you to map current insurance assignments to a replacement assignment.	69005

Menu Item/Function	Description	SAR
Insurance Type Maintenance	**Enhancement**: For calculated items, add the ability to select the supplemental pays to be included in the calculation of the selected insurance type.	63725
	Enhancement: Added new fields to enable you to have iVisions prompt users to do something with an attached document. You can also specify the text of the prompt.	68595
Life Event Changes	Corrected a problem with being unable to add a life event if the employee had a prior life event that has expired (never submitted).Changed the system to automatically change the status to Expired when the current date is after the Close Date.	60013
	Enhancement: Added a new tab to enable you to select which enrollment steps to open in iVisions for the employee.	62589
	Enhancement: Added a new Note field to the screen.	69955
Pay History Report	**Enhancement**: If there are multiple fiscal years, the report will sort them in descending order (with pay periods in ascending order). Also corrected a problem with the rate not printing in the report.	58653

Payroll

Menu Item/Function	Description	SAR
Certificate Report	**Enhancement**: Added a new option to include/exclude archived certificates.	48588
Define Employee Forms	Changed the program to accept a WHERE clause in the SQL Statement.	71691
Direct Deposit	Corrected a problem with payroll deductions that are not marked 'Include on Check' showing on Direct Deposit Pay Receipts.	70869
Employee Certificates	**Enhancement**: Added the ability to archive certificates.	48588

Menu Item/Function	Description	SAR
Employee Deduction Listing	Changed the listing so that it is driven by the employee deduction setup and not the employee deductions journal. The report will now show everyone who has the deduction set up and their full gross from their pay journal records.	68634
Employee Deductions and Benefits	Corrected a problem with the Select Employees screen including archived employees.	67031
Employee Forms	**Enhancement**: Added District name, address, and EIN to the bottom of the W-4 form.	24425
Employee Leave Plans	Corrected a problem with the grid timing out when loading the grid.	72971
Employee Maintenance	**Enhancement**: Added Employee Template to the grid.	44586
	Enhancement: Added a Change Log tab to the Employee Maintenance screen. The tab tracks changes to employee demographics.	62627
	Corrected a problem that occurred when using Employee Forms through the employee wizard and then not selecting any forms.	69568
Employee Positions and Pay	**Enhancement**: New menu item consolidates the former Employee Positions, Employee Supplemental Pay, Position Inventory, and Contract Assignment screen.	62627
	Enhancement: Added a mass change utility to the Actions|Shortcuts menu.	51503
Employee Templates	**Enhancement**: Added a new option to the Actions menu to enable you to copy templates.	70691
Employee Time Card Entry	**Enhancement**: Added start and end dates to the grid.	63810
	Corrected a message that was occurring when entering sub detail.	72701
Fast Leave Entry	Added warning messages to display when a possible duplicate transaction is entered.	2832

Menu Item/Function	Description	SAR
Journal Totals Report	**Enhancement**: If there are any voids in the pay periods, the report will now include them after the information for each bank	38089
Leave Plan Maintenance	**Enhancement**: Increased the number of alternate plans from 4 to 6.	72432
Pay Descriptions	**Enhancement**: New menu item enables you to pre-define the Pay Descriptions used when you define positions.	71661
Payroll Default Settings	**Enhancement**: Added settings to enable you to interface to EdZapp for your web applicant interface.	67847
	Enhancement: Added a new option to require the use of predefined Pay Descriptions.	71661
Payroll Invoice Processing	Changed the vendor drop-down list to sort alphabetically.	70035
Payroll Processing	Changed the payroll posting journal entry to display the voucher number. The journal entry will still show NA for the voucher number in print preview mode; when you print the journal entry, the voucher number will be included.	69473
	Corrected a problem with the FTD and YTD printing correctly on direct deposit receipts.	71506
Pro Forma Report	Changed to print employees in alphabetical order.	68137
Salary Schedules	Enhancement: Added the ability to print a listing from the salary schedule tabs. Note this is a straight listing, with no subtotaling or ability to save the listing.	73157
Work Calendars	Corrected a problem with the export to Excel if there were more than 50 records.	71436

Purchasing and Payables

Menu Item/Function	Description	SAR
Control Panel	Changed the software to enable the ship-to address to default into new requisitions for Purchasing and Payables central site users.	64178
	Changed the Internal Notes field to display the most recent note first. Notes are now displayed in reverse chronological order. Also changed to display the note first and then the user name and time stamp. This change applies only to notes entered after Version 2.2 is installed. Old notes will not be changed.	66671
	Corrected a problem with the Req not being flagged as an eShopping Req, thus preventing the user from being able to send the order electronically.	70714
Disbursement Detail Listing	Reformatted the report and removed the note that said says the totals excluded Voids and Manual checks	61772
Invoice Processing	**Enhancement:** Added a new option to the grid's Actions menu to enable you to review the invoice **Approval Log.**	72661
Purchasing and Payables Default Settings	**Enhancement**: Modified the existing option to enable you to also print account descriptions for accounts in the Voucher Detail Report.	67047
	Enhancement: Added a new option to require users to have all purchase order revisions go back through the approval process before allowing a purchase order to be changed.	44981
Purchase Order Revisions	**Enhancement**: A new menu item to create a requested revision to a purchase order and send it through the approval process before changing the purchase order.	44981
Purchase Orders	**Enhancement**: You can now edit certain header fields without requiring PO revision.	44981

Menu Item/Function	Description	SAR
Requisitions	**Enhancement:** Added the Quick Requisition utility.	65809
	Enhancement: The requisition screen as been updated to show the multiple order vendors in the vendor combo box. Requisition and PO approval grids have been updated to show the new order name as well.	67430
Receiving	**Enhancement**: Added Vendor Order Name to Purchase Order Receiving grid	70665
Vendor Category Assignment	Corrected a problem with the Add button on the grid working correctly.	63089
Vendor Maintenance	Added a Warning message when adding a duplicate Social Security number in Vendor Maintenance.	50238
	Enhancement: Added the ability to define multiple Vendor Order Addresses.	67430
	Enhancement: The 1099 Box field is now required if the vendor is a 1099 vendor.	69985
Vendor/PO Reports	In the Vendor Invoice History report, Corrected a problem with the PO amount total being overstated if a PO had more than one invoice paid against it.	72019
Voucher Reports	Corrected a problem with voided checks records dropping out of the check detail and the account detail reports. Now voiding checks will produce the same totals on the header, the detail and the account summary.	72674

Security

Menu Item/Function	Description	SAR
Approvers	**Enhancement**: Added the ability to specify alternate approvers.	67431
Change Log	**Enhancement**: New menu item displays changes to employee demographic and pay information.	62627

Menu Item/Function	Description	SAR
Distributed Accountability Centers	If there is a valid prior year database connection, the system will now check to see if the rollover step has been done for payroll (step 6). If not, the system won't allow you to delete a DAC.	56556
	Changed the program to not allow you delete a DAC that is tied to a GL Report Writer report. The system will issue a message instead.	63185
Email Alerts	Corrected a problem with email alerts not working correctly for expiring certificates.	71993
Invoice Approvers	**Enhancement**: Added the ability to define an approval queue for invoices. This utility is only available if you also have iVisions.	70163
Module Restrictions	**Enhancement**: Added a brief description of each of the menu items that displays when you mouse over the menu item.	68036
PAR Approvers	**Enhancement**: Added a new option to the Actions menu to enable you to copy the approval routing of a PAR template.	52228
User Role Listing	**Enhancement**: Added Entity to the selection criteria.	59445
	Enhancement: Added a new option to Include Expanded Description, which provides a brief description of the menu items.	68036
User Listing	**Enhancement**: Added Entity to the selection criteria.	59445
User Security	**Enhancement**: In Module Restrictions, added a brief description of each of the menu items that displays when you mouse over the menu item.	68036
	Enhancement: Removed the Employee Maintenance tab. Replaced by the Payroll User Role screen.	62627
	Enhancement: Added the **Allow Posting of Deposits to General Ledger** option to specify which users can post deposits.	43680

System

Menu Item/Function	Description	SAR
Menu Bar	**Enhancement**: If you have set up a special color for the connection group, that color will now also display in the menu bar in addition to the Actions pane in the main menu.	64520
	Enhancement: Added the option to toggle on/off expanded menu item descriptions to the Help menu.	68036
Grid Functions	Corrected a problem with being able to save grid layouts if using Vista and SQL 2005.	69569
	Removed the records toolbar from screens with more than one grid in them. Use the right-click menu in these screens to access grid functions.	71058
Update Notification	Removed the ability for a user to turn off the update notification.	70289

Warehouse

Menu Item/Function	Description	SAR
Control Panel	**Enhancement**: The status column will now display when a shipped order has been posted to the General Ledger.	72639
Order Fulfillment Report	Enhancement: Changed the default sort order on the Order Fulfillment Report to be by first by Warehouse, then Bin Location, then Item Number. Changed the report title to be "Order Fulfillment Pick List". On the Ship Orders grid, also changed the label of the action for that report to Order Fulfillment Pick List.	71392
Print Shipping Receipts	**Enhancement**: Added a new option to enable you to Collate Copies.	65695
Ship Warehouse Orders	Corrected a problem with attempting to ship a portion of a case pack.	71932
Usage Reports	**Enhancement**: Added the option to sort by item description.	60199

Menu Item/Function	Description	SAR
Warehouse Default Settings	The Cash Offset has been changed to allow any type of offset .	71958
Warehouse Requisitions	**Enhancement**: Added the Quick Requisition utility to warehouse requisitions.	65089

State Requirements Code

The following changes and enhancements were made to state requirements code for 2.2.

California

Menu Item/Function	Description	SAR
Account Code Input	**Enhancement**: Added an additional field for State Reporting Code.	70160
Bank Accounts	**Enhancement**: Added a new file type to the Bank Record File Type field for Ventura. Modified Bank Statements to handle the Ventura file type for loading bank files for reconciliation.	70517
Credential Audit File	**Enhancement**: Added a menu item to enable you to create Credential Audit Files after payroll runs.	72099
Deductions and Benefits	**Enhancement**: Added California State Tax deduction type.	70344
	Enhancement: Added California CSEA Dues and CTA Dues deduction types.	71640
Employee Deductions and Benefits	**Enhancement**: Added a setup screen for State Tax.	70344
Employee Positions and Pay	**Enhancement:** Added the pay matrix fields to the CA state data tab. Also added the fields to the Employee Positions screen.	73089

Menu Item/Function	Description	SAR
Interest Apportionment	**Enhancement**: Added a new menu item to perform interest apportionment.	71311
Retirement Setup	**Enhancement**: Added menu items for defining bargaining units, credential codes, job classes, and pay matrices.	71663
Warrants Transfer	**Enhancement**: Added a Warrants Transfer utility.	70405

Colorado

Menu Item/Function	Description	SAR
CDE Human Resources Reporting	**Enhancement**: Changed the program so that unique positions are created at the employee data level instead of the report level.	45022 47732
	Enhancement: When updating CDE records, the program will check and see if there is a position code defined, if there is then this value will be used. If not then the 6th element of the account code will be used and the user can modify.	45030
	Enhancement: Moved the "employee as of" function to the CDE Employee Data screen and removed it from the reporting process.	45814
	Enhancement: Moved the building code logic from the report side to the data side.	66410
	Enhancement: Added new utilities to generate and create a file for CDE Special Education Human Resources reporting.	68387

Montana

Menu Item/Function	Description	SAR
Deduction/Benefits	Added the new Seasonal Indicator selection, "N – Non Contributing" for deduction type Retirement – Montana PERS Defined Benefit Plan	72360

South Carolina

Menu Item/Function	Description	SAR
Deductions/Benefits	Added a deduction type for South Carolina State Tax.	70572
Employee Deductions and Benefits	Added a setup tab for South Carolina State Tax.	70572